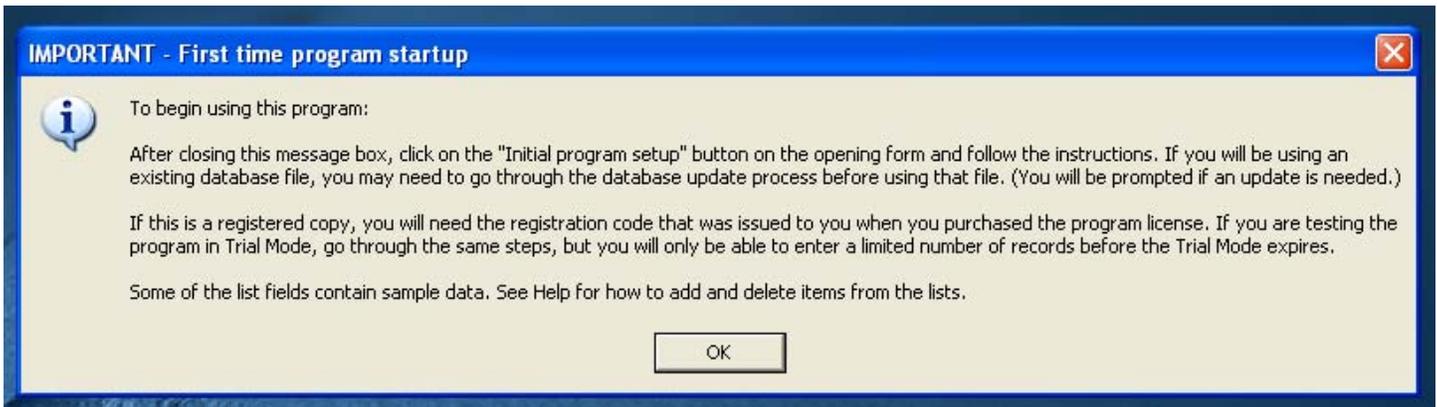
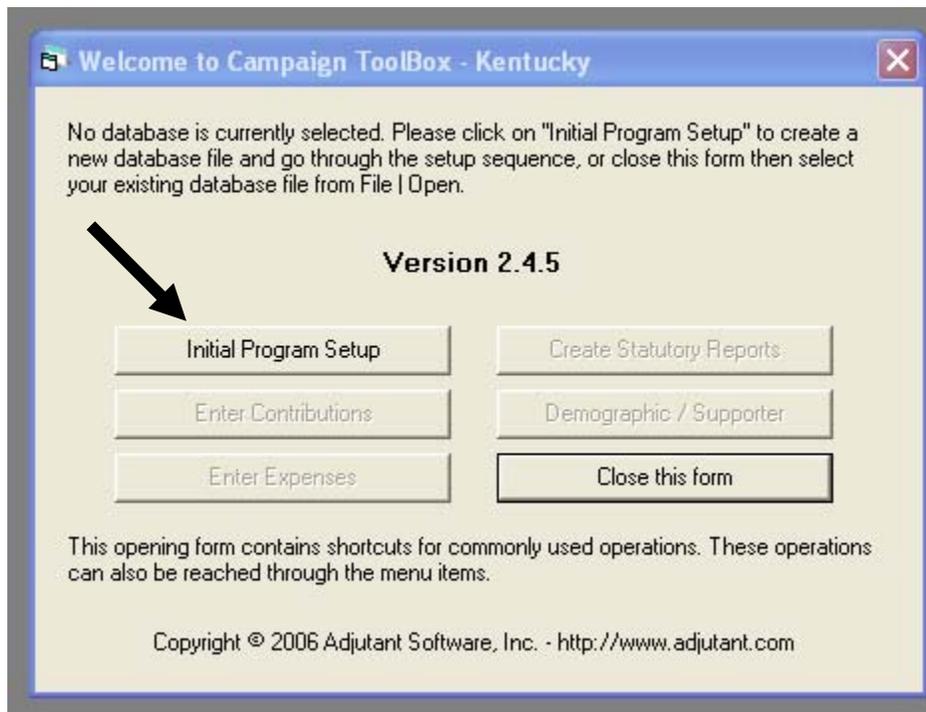


Campaign Toolbox Initial Program Setup

The first time you open Campaign Toolbox you will receive the following important startup message. Click on "OK" to continue.

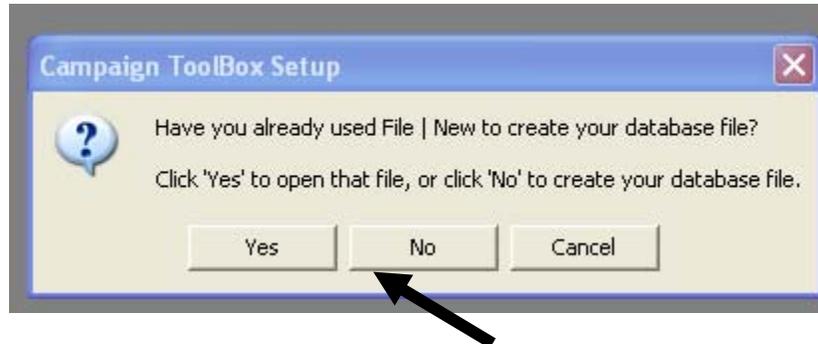


Click on the "Initial Program Setup" button to setup the program for your campaign.

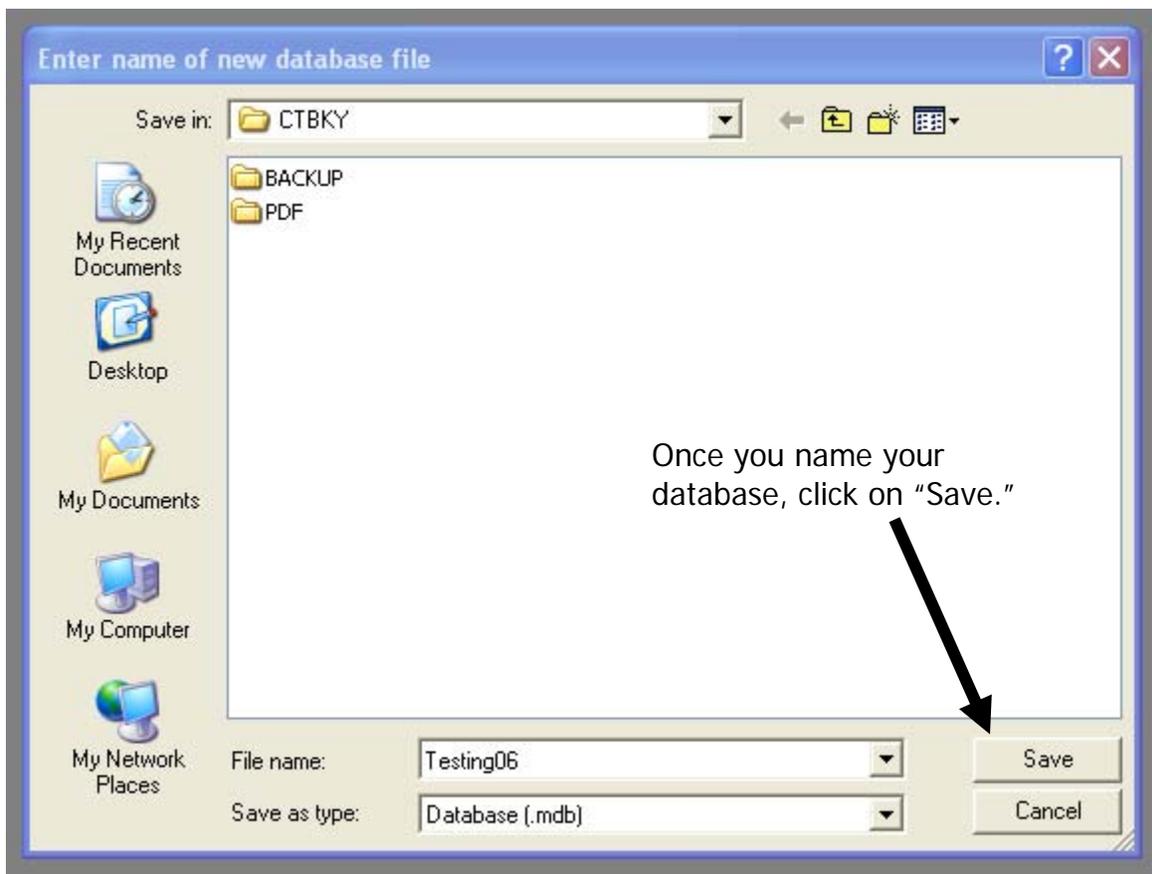


Campaign Toolbox Initial Program Setup

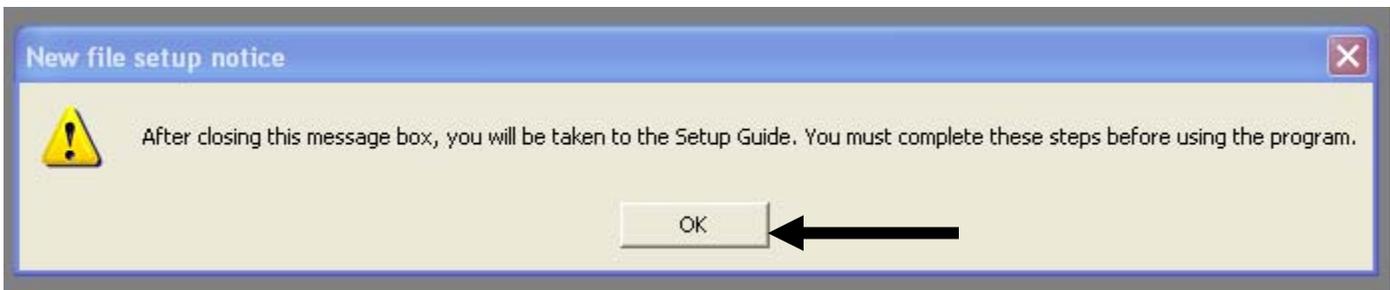
In the Window below click on "NO" to verify that you have not previously created a database.



"Campaign.mdb" is the default database name. We suggest you click on "No" and create a file with a name that is meaningful to the campaign such as "primary06.mdb."



Campaign Toolbox Initial Program Setup



Step 0 of 53

This is the first step of the Initial Program setup procedure. However, depending on what type of Reporting Entity you are filing for, some fields may not have to be completed.

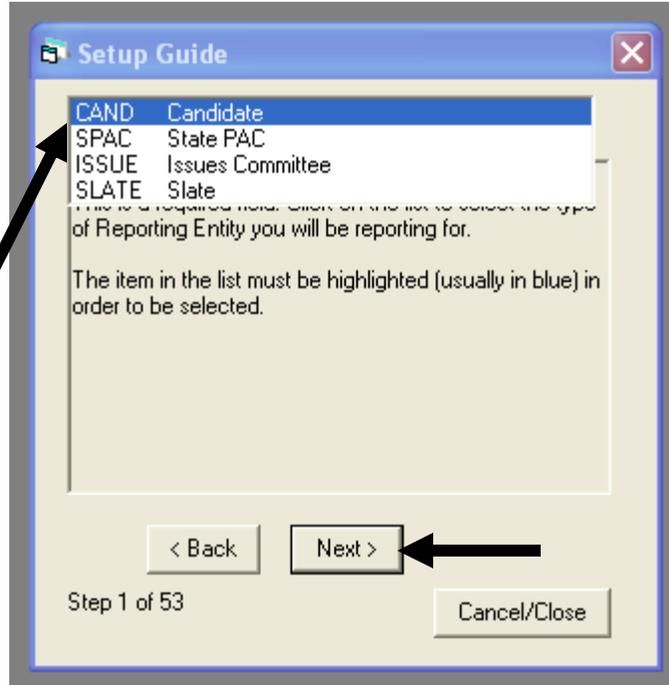


Campaign Toolbox Initial Program Setup

Step 1 of 53

Choose your Reporting Entity type. Remember, if you are reporting for a candidate or a candidate's committee, which is NOT running for Governor/Lt. Governor, you should choose "Candidate" from the drop-down box.

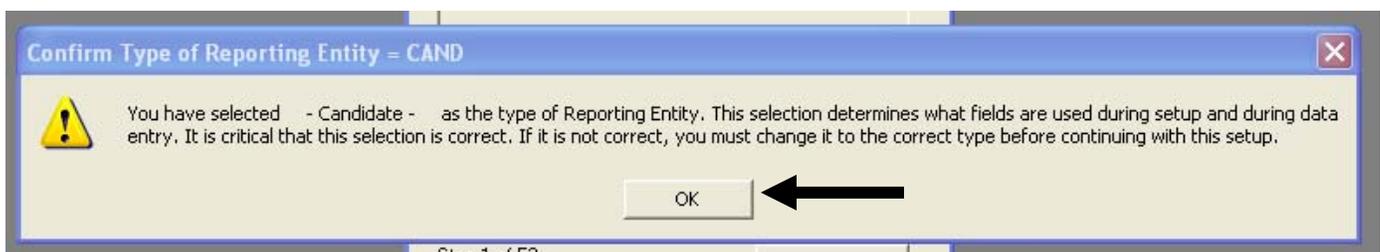
You will need to click on one of the Reporting Entities. An Entity is chosen when you see it highlighted in blue



If you click on "Next" without choosing an Entity you will receive the following error:



Once you choose a Reporting Entity and click "Next", the following message will be displayed asking you to verify your choice. Click "OK" to verify.



Campaign Toolbox Initial Program Setup

Step 2 of 53

Enter the name of the office you are seeking.

Office Sought - Max. field size = 50
This is a required field. Be sure to include the district if applicable. Leave this field empty if not applicable.

< Back Next > Cancel/Close

Step 2 of 53

Step 3 of 53

Designate if you are running in a statewide race. Unless you are running for Governor, Lt. Governor, or any of the Constitutional Officer positions, your answer is "N". This step also determines which of the rest of the 53 steps you will need to enter data into.

For the remainder of this tutorial we are going to assume that the candidate is NOT seeking a statewide office.

Statewide race? - Max. field size = 1
This is a required field. Enter "N" if not applicable.

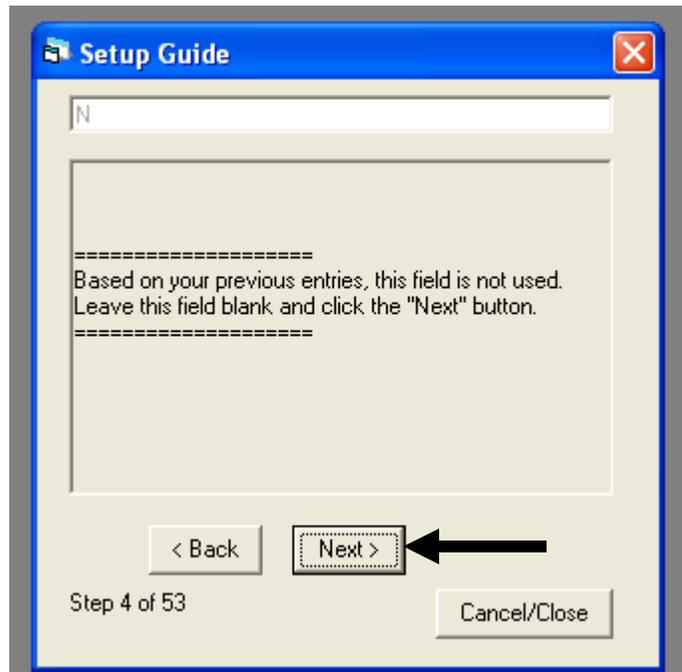
< Back Next > Cancel/Close

Step 3 of 53

Campaign Toolbox Initial Program Setup

Step 4 of 53

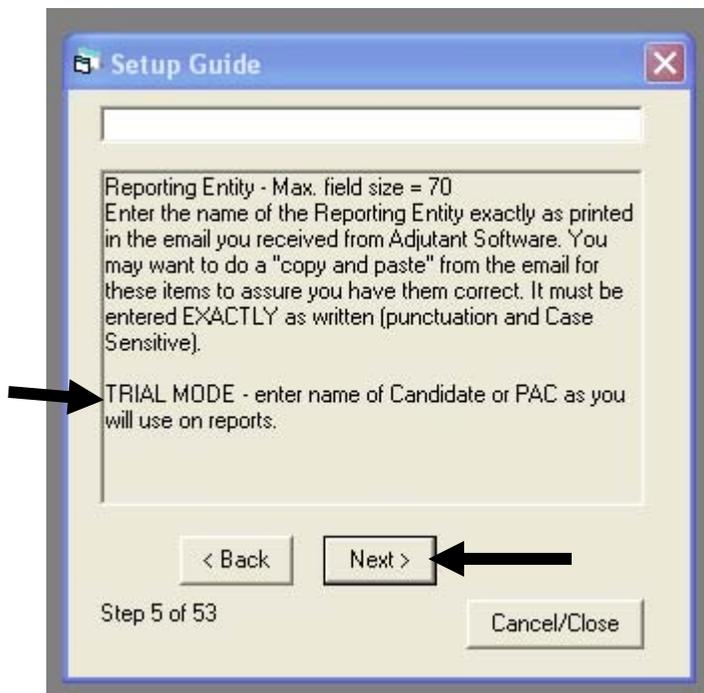
This step is not needed since our candidate is not running in a statewide race.



Step 5 of 53

The Reporting Entity is on the email from Adjutant Software which you will receive once you submit the Registration Agreement.

If you are trying out the software please follow the instructions for the TRIAL MODE.



Campaign Toolbox Initial Program Setup

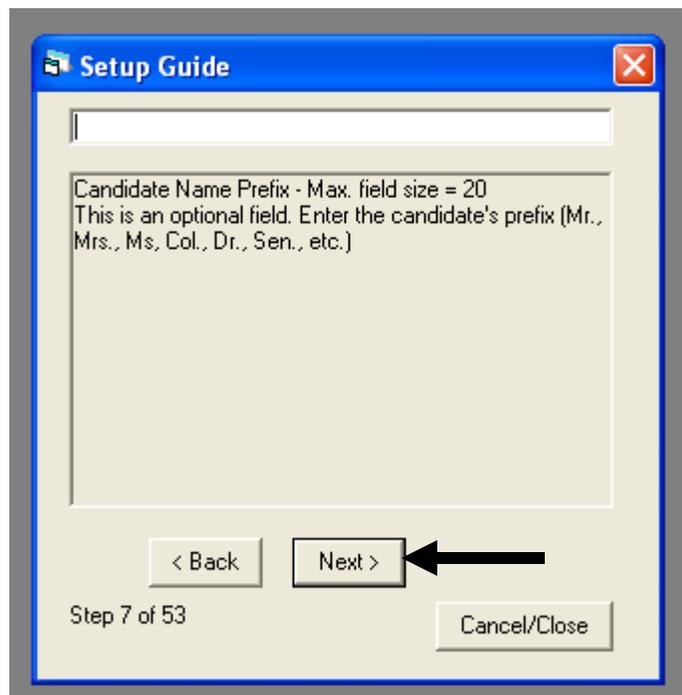
Step 6 of 53

This step is not needed since our candidate is not running in a statewide race.



Step 7 of 53

This step is optional. Enter the Candidate's Name Prefix.



Campaign Toolbox Initial Program Setup

Step 8 of 53

Enter the Candidate's First Name.

Candidate First Name - Max. field size = 50
This is a required field. Enter the First Name of the Candidate.

< Back Next > Cancel/Close

Step 8 of 53

Step 9 of 53

This field is optional. Enter the Candidate's middle name.

Candidate Middle Name - Max. field size = 50
This is an optional field. Enter the Middle Name of the Candidate.

< Back Next > Cancel/Close

Step 9 of 53

Campaign Toolbox Initial Program Setup

Step 10 of 53

Enter the Candidate's Last Name.

Setup Guide

Candidate Last Name - Max. field size = 50
This is a required field. Enter the Last Name of the Candidate.

< Back Next > Cancel/Close

Step 10 of 53

Step 11 of 53

This field is optional. Enter the Candidate's Suffix.

Setup Guide

Candidate Name Suffix - Max. field size = 50
This is an optional field. Enter the Candidate Name Suffix (Jr., Sr., III, etc.)

< Back Next > Cancel/Close

Step 11 of 53

Campaign Toolbox Initial Program Setup

Step 12 of 53

Enter the Candidate's Date of Birth.

Setup Guide

Candidate's Date of Birth - Max. field size = 10
This is a required field. Use mm/dd/yyyy format for the date.

< Back Next > Cancel/Close

Step 12 of 53

Step 13 of 53

Enter the election date. If this date is not correctly entered, your data file cannot be processed. Please check the KREF website for election dates.

Setup Guide

Election Date - Max. field size = 10
This is a required field. Enter the Election date for this database file.

IMPORTANT - A new database file MUST be created for each new election. Do not simply continue adding records to a database file from a previous election.

Use mm/dd/yyyy format for the date.

< Back Next > Cancel/Close

Step 13 of 53

Campaign Toolbox Initial Program Setup

Step 14 of 53

The Program Expiration Date is on the email from Adjutant Software.

If you are trying out the software please follow the instructions for the TRIAL MODE.

MM/DD/YYYY

Program Expiration Date
Enter the Program Expiration Date exactly as printed in the email you received from Adjutant Software, using the mm/dd/yyyy format.

TRIAL MODE - Enter any date later than today if you are testing in Trial Mode.

< Back Next > Cancel/Close

Step 14 of 53

Step 15 of 53

The Program Options Code is on the email from Adjutant Software.

10000

Program Options Code
Enter the Program Options Code exactly as printed in the email you received from Adjutant Software.

TRIAL MODE - use the default.

< Back Next > Cancel/Close

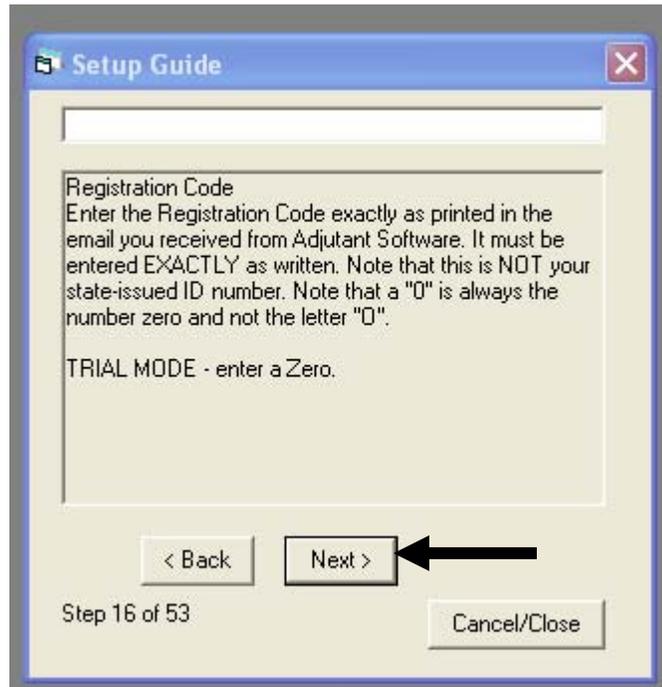
Step 15 of 53

Campaign Toolbox Initial Program Setup

Step 16 of 53

The Registration Code is on the email from Adjutant Software.

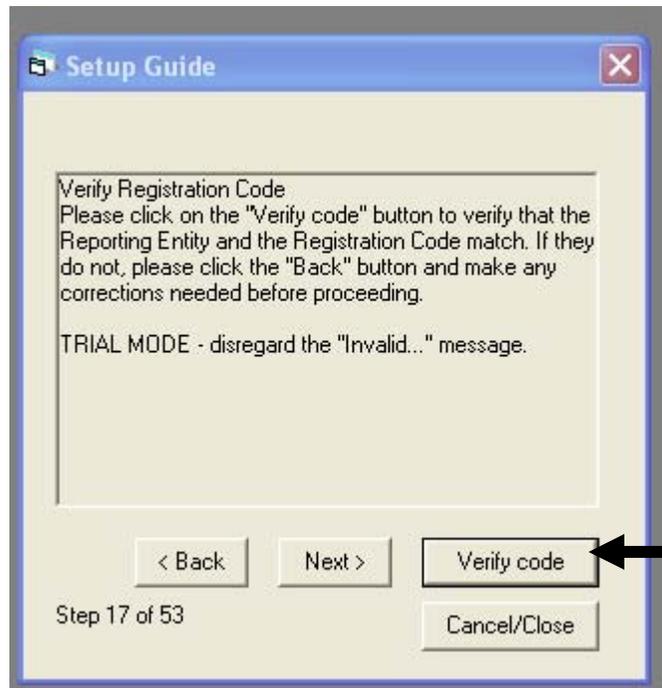
If you are trying out the software please enter a "0."



Step 17 of 53

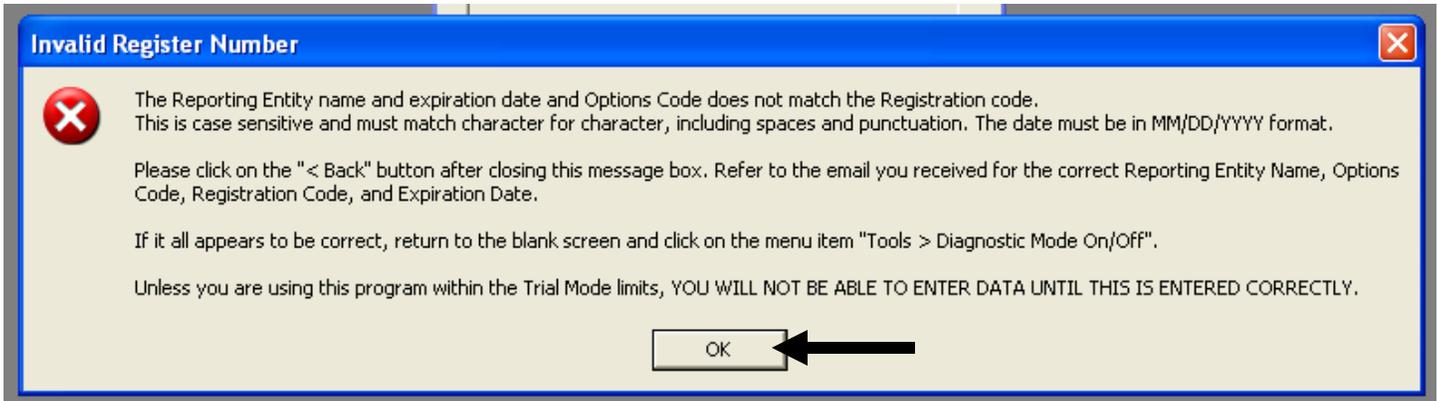
Click on the "Verify Code" button.

If you are trying out the software please disregard the "Invalid...." Message.

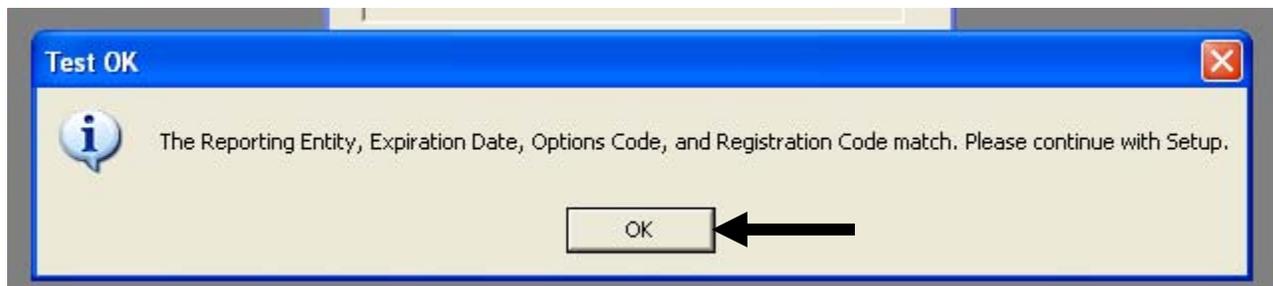


Campaign Toolbox Initial Program Setup

If you get this message box after clicking on the "Verify Code" button, one of the fields mentioned in the message may have been entered incorrectly. If needed call the Registry for assistance.

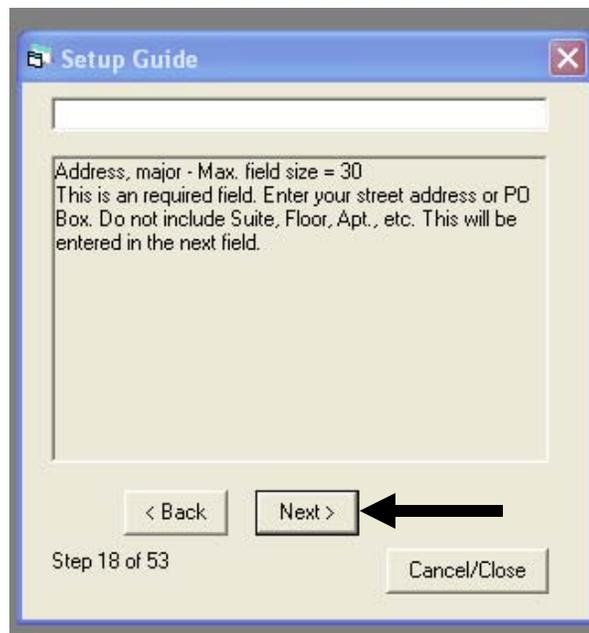


Once you verify the code successfully, click on the "OK" button and proceed to the next step.



Step 18 of 53

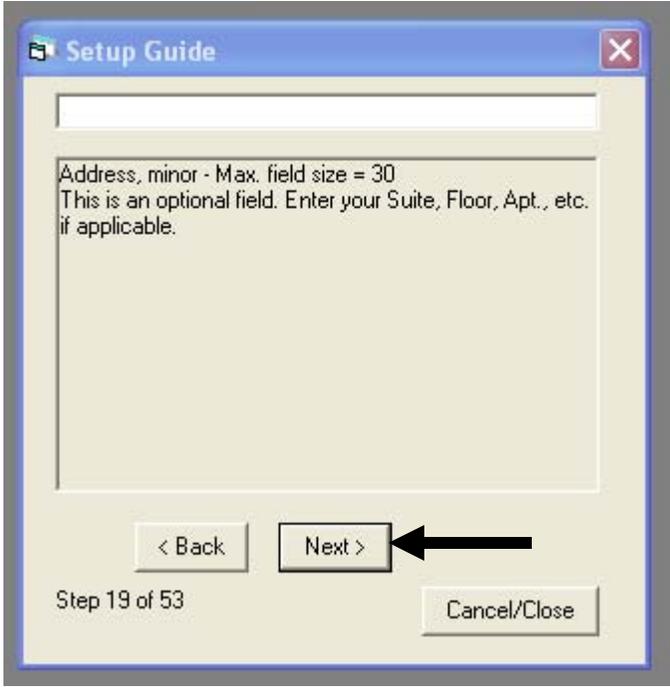
Enter the Candidate's mailing address.
This field is required.



Campaign Toolbox Initial Program Setup

Step 19 of 53

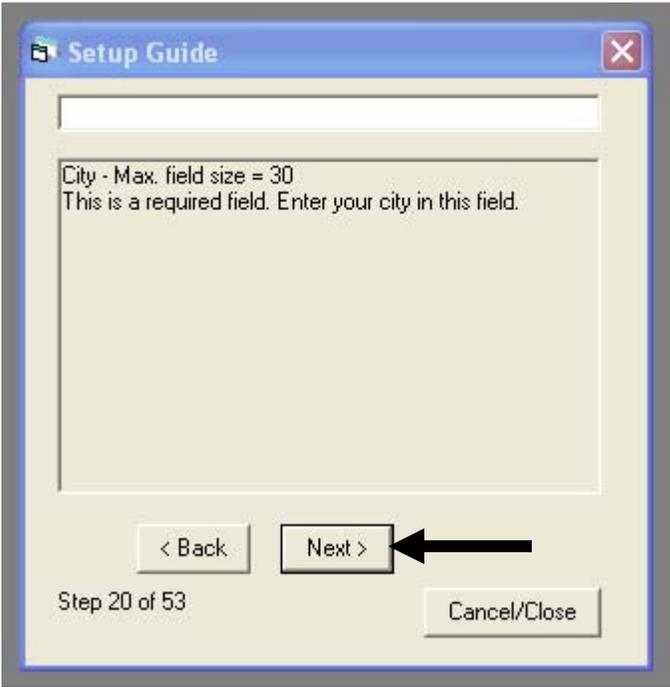
Step 19 of 53 is not required. In this field, you may enter an additional line of address.



The screenshot shows a dialog box titled "Setup Guide" with a close button (X) in the top right corner. It features a text input field at the top. Below the field, the text reads: "Address, minor - Max. field size = 30" and "This is an optional field. Enter your Suite, Floor, Apt., etc. if applicable." At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel/Close". A black arrow points to the "Next >" button. The text "Step 19 of 53" is displayed in the bottom left corner of the dialog.

Step 20 of 53

Enter the candidate's city for the candidate's mailing address.

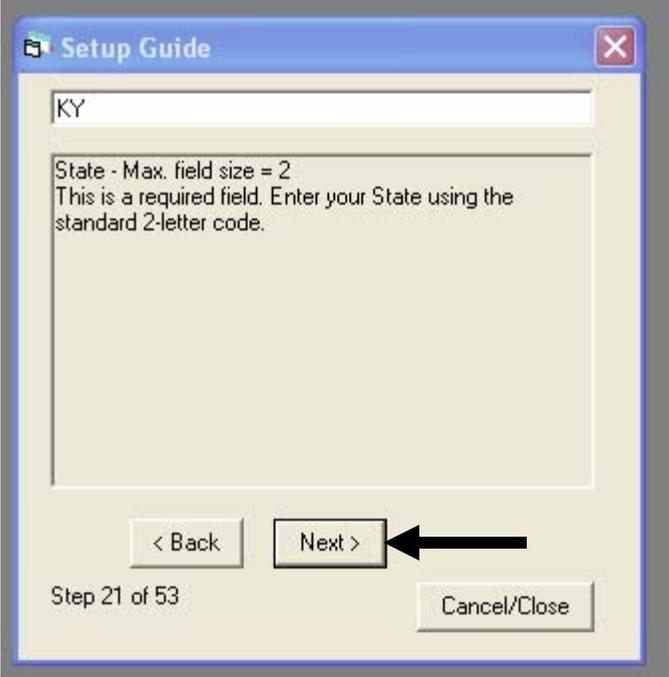


The screenshot shows a dialog box titled "Setup Guide" with a close button (X) in the top right corner. It features a text input field at the top. Below the field, the text reads: "City - Max. field size = 30" and "This is a required field. Enter your city in this field." At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel/Close". A black arrow points to the "Next >" button. The text "Step 20 of 53" is displayed in the bottom left corner of the dialog.

Campaign Toolbox Initial Program Setup

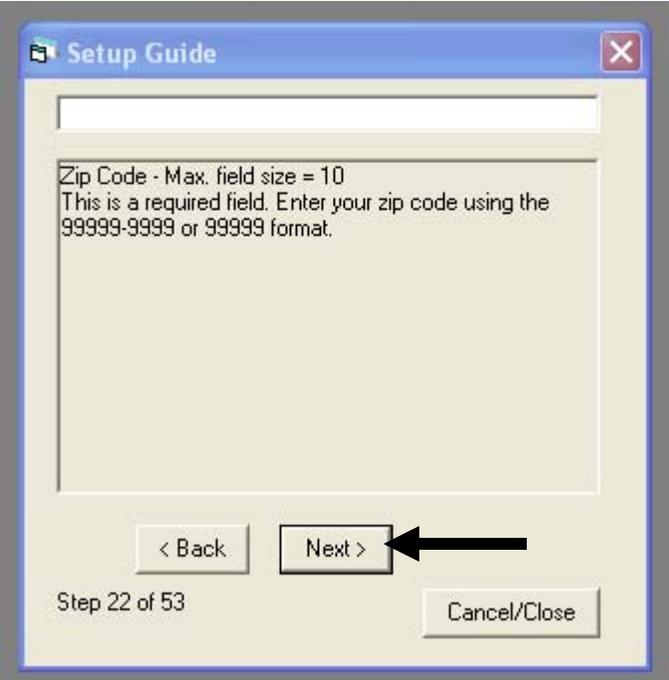
Step 21 of 53

This step defaults to "KY". The candidate's state is required for mailing information.



Step 22 of 53

Enter the candidate's zip code.



Campaign Toolbox Initial Program Setup

Step 23 of 53

Enter the candidate's Filer Number. This number is sent in the email you will receive from the Registry.

If you are trying out the software please enter "12345."

Setup Guide

Filer Number - Max. field size = 20
This is a required field. Enter your state-issued Filer ID number. If you do not have it, call KREF at 502-573-2226 and ask them for your number.
If testing in Trial Mode, enter "12345".

< Back Next > Cancel/Close

Step 23 of 53

Step 24 of 53

Enter the candidate's Number. This number is sent in the email you will receive from the Registry.

If you are trying out the software please enter "12345."

Setup Guide

Candidate Number - Max. field size = 50
This is a required field. Enter your state-issued Candidate ID number. If you do not have it, call KREF at 502-573-2226 and ask them for your number.
If testing in Trial Mode, enter "12345".

< Back Next > Cancel/Close

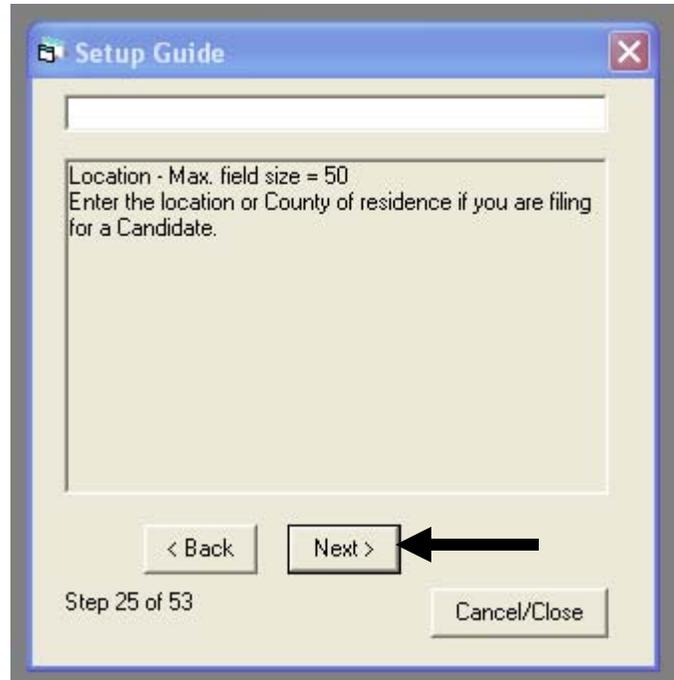
Step 24 of 53

Campaign Toolbox Initial Program Setup

Step 25 of 53

Enter the candidate's county of residence.

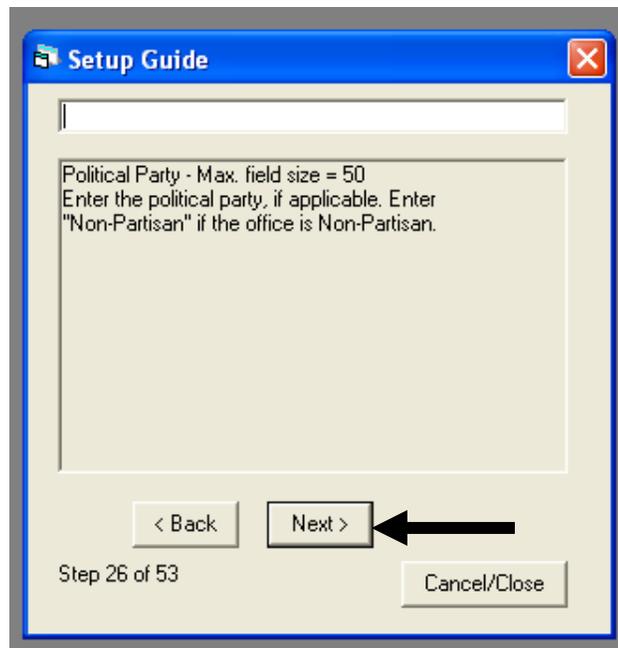
The County Clerk in this county will get a copy of the hard copy report that you submit to the Registry in addition to the electronic file.



Step 26 of 53

Enter the candidate's political party.

If your candidate is seeking a non-partisan office, enter "Non-Partisan" in this field.



Campaign Toolbox Initial Program Setup

Step 27 of 53

You must provide the name of the person who will most often sign the hard copy of the financial report.

Signature - Max. field size = 50
This is a required field. Enter the name of the person who will be signing the reports.

< Back Next >

Step 27 of 53 Cancel/Close

Step 28 of 53

Enter the treasurer's full name.

Treasurer's Name - Max. field size = 50
This is an required field. Enter the full name of the Treasurer.

< Back Next >

Step 28 of 53 Cancel/Close

Campaign Toolbox Initial Program Setup

Step 29 of 53

Enter the treasurer's address.

Treasurer's Address, major - Max. field size = 30
This is a required field. Enter the Treasurer's street address or PO Box. Do not include Suite, Floor, Apt., etc. This will be entered in the next field.

< Back Next > Cancel/Close

Step 29 of 53

Step 30 of 53

This optional is an additional line for the treasurer's mailing address.

Treasurer's Address, minor - Max. field size = 30
This is an optional field. Enter the Treasurer's Suite, Floor, Apt., etc. if applicable.

< Back Next > Cancel/Close

Step 30 of 53

Campaign Toolbox Initial Program Setup

Step 31 of 53

Enter the city for the treasurer's mailing address.

Setup Guide

Treasurer's City - Max. field size = 30
This is a required field. Enter the Treasurer's city in this field.

< Back Next > Cancel/Close

Step 31 of 53

Step 32 of 53

This field defaults to "KY" and is required for mailing information.

Setup Guide

KY

Treasurer's State - Max. field size = 2
This is a required field. Enter the Treasurer's State using the standard 2-letter code.

< Back Next > Cancel/Close

Step 32 of 53

Campaign Toolbox Initial Program Setup

Step 33 of 53

Enter the candidate's zip code for the treasurer's mailing address

Treasurer's Zip Code - Max. field size = 10
This is a required field. Enter the Treasurer's zip code using the 99999-9999 or 99999 format.

< Back Next >

Step 33 of 53 Cancel/Close

Step 34 of 53

Enter the candidate's phone number where the treasure may be reached.

Treasurer's Phone - Max. field size = 20
This is a required field. Enter the Treasurer's area code and phone number using the 999-999-9999 format.

< Back Next >

Step 34 of 53 Cancel/Close

Campaign Toolbox Initial Program Setup

Step 35 of 53

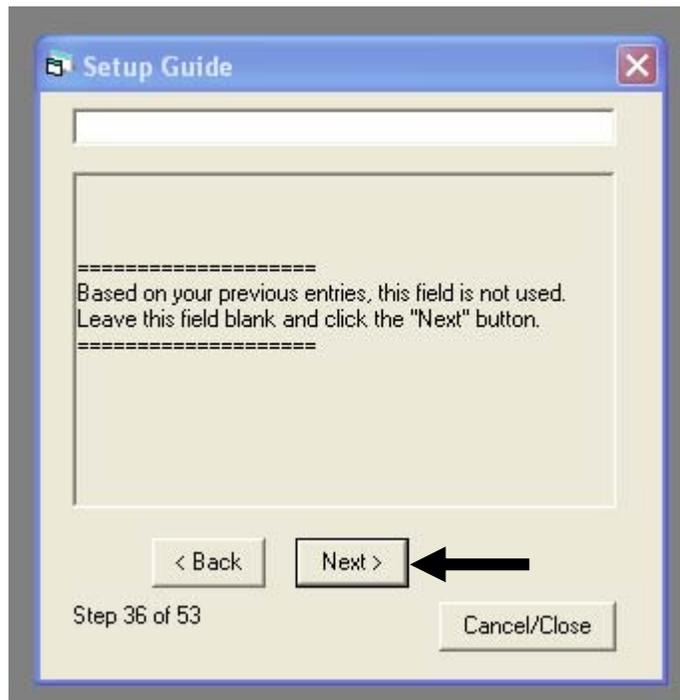
Enter an email address where we may contact an official representative of the campaign.



Step 36-42 of 53

Steps 36 through 42 of 53 are not required information for non-statewide candidates.

Click "Next" until you get to step 43.



Campaign Toolbox Initial Program Setup

Step 43 of 53

Enter the candidate's phone number.

Custodian or Candidate Phone - Max. field size = 20
This is an optional field. Enter the Custodian (if filing for a PAC) or Candidate (if filing for a candidate) area code and phone number using the 999-999-9999 format.

< Back Next > Cancel/Close

Step 43 of 53

Step 44-50 of 53

Step 44-50 are not required information for non-statewide candidates.

Click "Next" until you get to step 51.

Custodian or Candidate Phone - Max. field size = 20
This is an optional field. Enter the Custodian (if filing for a PAC) or Candidate (if filing for a candidate) area code and phone number using the 999-999-9999 format.

< Back Next > Cancel/Close

Step 43 of 53

Campaign Toolbox Initial Program Setup

Step 51 of 53

Enter the campaign's start date. This date must be at least one day earlier than any of the transactions entered into the database for financial reporting.

10/11/2006

Campaign Start Date - Max. field size = 10
Enter any date on or before your first record to be reported. This date is used to tell the program to ignore all records prior to this date.

This date should always be earlier than ANY records in this database file that should be reported.

PACs should use a date like 01/01/1990.

Use mm/dd/yyyy format for the date.

< Back Next > Cancel/Close

Step 51 of 53

Step 52 of 53

This field defaults to "KY."

KY

Default State - Max. field size = 2
This is a required field. Enter the State using the standard 2-letter code. This will appear as the default value in the state field when you are entering new records.

< Back Next > Cancel/Close

Step 52 of 53

Campaign Toolbox Initial Program Setup

Step 53 of 53

Click on the "Cancel/Close" button to exit the form. Your setup is now completed.

